



# Menorah Park Foundation

## A Gift that Could Change the Future

We've often mentioned *The Chronicle of Philanthropy*, a newspaper published every two weeks for professionals in the field of fundraising. Every year the paper publishes a list of the most philanthropic Americans which is usually filled with names you'd expect to see, like Bill and Melinda Gates, Oprah Winfrey, Michael Bloomberg and scions of entertainment and industry. But there are also names of people you've never heard, men and women who had modest jobs but accumulated the kind of wealth reported in the article.

Many of these people give to causes that have touched their lives deeply; a hospital that saved their life, a Boys and Girls Club that kept them off the streets when they were growing up, a disease-related organization searching for the cure for something that took the life of a loved one, an alma mater or a religious organization.

But this year, one story really caught our eye.

It was the story of Lillian Garner who left the Jewish Home and Care Center Foundation in Milwaukee \$38.4 million plus her home, its furnishings, a charitable trust and many personal effects. The bequest was earmarked to support medical care for residents who have no family or financial resources. Ms. Garner wasn't too familiar with the Jewish Home, the article says, but her mother and brother had left bequests to the agency so she thought she should visit when preparing her own will. She made a phone call to the center's president and arranged for a tour of the facility. The rest is history.

Prior to her death, Ms. Garner made regular gifts of \$25 or \$50 so no one knew the scope of her wealth when she told the president she would leave the Center in her will. Imagine everyone's surprise when the Center was informed they would glean approximately \$40 million following her death last summer. Conservatively, the bequest will provide the Milwaukee Home with a \$2 million annual income to care for their Medicaid residents.

A gift like that could change lives in miraculous ways.

A gift like that could erase the annual deficit of Menorah Park.

We know there are few people like Lillian Garner. But there are hundreds of people whose lives have been touched by Menorah Park who are able to say "thank you" for caring for their grandmothers, grandfathers, mothers, fathers, spouses and friends through bequests and estate gifts.

Please consider being one of those people. You don't need to be a millionaire to make a big difference.

For information on how you can make a difference in the lives of hundreds of people, by leaving Menorah Park in your will, contact the Foundation office at 216-595-7324.



**Rose Glazer celebrated her birthday on the Friedman Pavilion, thanks to a party provided by her son Larry and daughter Toby Eisenberg, shown here with granddaughter Michelle Eisenberg. Larry has made arrangements in his estate plan to provide an annual staff appreciation party on the Friedman Pavilion.**

*Where there's a will, there's a way. Is Menorah Park in your will?*

## If You Haven't Thought About Establishing a Charitable Remainder Trust, Why Not?

As charitable family and community members and donors make plans to pass their estate on to the next generation, nonprofit organizations like Menorah Park hope to be a part of their estate plan.

From both the donor's perspective, and a charitable organization's, a Charitable Remainder Trust (CRT) can be a great estate planning tool.

A Charitable Remainder Trust (CRT) is an arrangement where a donor transfers cash, stock, bonds, mutual fund shares, life insurance or real estate to a non-profit organization, like Menorah Park, and receives the income generated from the assets. The transfer is irrevocable and can not be returned to the donor.

**There are two types of CRTs.**

**A CRT Annuity Trust provides a specific dollar amount** be paid to the donor or beneficiary that **will not fluctuate over time**. The payout cannot be less than 5% of the assets transferred into the trust for a maximum of 20 years. When the trust ends, the money left in the trust passes to one or more charities.

**A CRT Unitrust provides a fluctuating amount every year.** While **the payout is a fixed percentage of the value of the assets** in the trust, it cannot be less than 5% of the trust's assets. As the amount in the trust grows, so does the payout. Conversely, if the assets in the trust decrease, so will the payout. When the trust ends, the principal passes to one or more charities.

The type of CRT a person chooses is as simple as knowing if a donor wants a fixed or variable amount of income.

The advantages of setting up a CRT are:

1. When you set up your CRT, you will receive a tax deduction for the current value of the interest which is expected to come to Menorah Park.
2. You'll be helping to insure the future of Menorah Park.
3. You, and perhaps a beneficiary, will receive regular payments from your trust.
4. You can avoid capital gains taxes on any appreciated assets you give to the trust. In fact, with careful planning, a CRT can save you thousands of dollars in estate taxes.

Payments from the trust can be made quarterly, semi-annually or annually for a set number of years.

For more information on how a Charitable Remainder Trust can be of benefit to you and Menorah Park, talk to your financial professional.

## Many Funds – Many Purposes!

**Announcing two new Donor-Restricted Funds this month!**

**Sally Roth Cohen Staff Spirit Award Fund** – this fund will support an award to be presented annually to a staff member whose cheerful, good natured spirit, upbeat personality and smile brings joy to our residents, family members, guests and staff and is a role model for others.

**Roz & Marty Kaufman Arts & Crafts Fund** – this fund will provide additional funding for the Creative Arts Center at Menorah Park.

This brings our number of Donor-Restricted funds to 190! Please help us reach 200 this year!!



**Tai Chi classes are provided throughout the Menorah Park campus thanks to generous gifts from the Resident and Teen Philanthropy Boards.**

*The Menorah Park Foundation, a Supporting Organization of Menorah Park Center for Senior Living  
Edwin Z. Singer, President • Barbara Gross, Director • Carol Wolf, Assistant Director • 216-595-7324*

# Thank You to...

- Kahn Kleinman for their support of the Financial Professional's Seminar
- Our many Donor-Restricted Fund donors who made gifts to their funds at the end of 2007
- Leighton Rosenthal Family Foundation for their support of the Music Therapy program
- Vic and Ellen Cohn and an anonymous donor who allows us to provide strength training to our Adult Day Center participants
- The Nathan L. & Regina Herman Charitable Fund and the Frances W. & H. Jack Lang Philanthropic Fund for their support of our Distance Learning programs
- The Nathan L. & Regina Herman Charitable Fund and to Jeanette & Morris Bir for their continued support of our Holocaust education program
- Bea Berger for her gift which will provide a Holocaust memorial at Wiggins Place
- To the many people who donate flowers from weddings, b'nai mitzvot and other celebrations for our residents to enjoy
- Laura & Alvin Siegal for their continued support of WLAS radio
- Helen & David Nagusky for their continued support of the Drumming program at Menorah Park



**Activities Coordinator Tiffani Brooks helps resident Blance Swimmer play her drum.**

# Wish List

## Menorah Park

Funding for a patio on the Heights Pavilion	\$100,000
Funding for Distance Learning classes	\$100-\$200 each
Weekly Oneg Shabbat following services	\$50 a week \$200 a month \$2,600 a year
Funding for Passover Goodie Bags	\$1,000

## The R.H. Myers Apartments

Unopened bottles of kosher wine or liquor	
Funding for college lectures	\$250 a month
Heavy duty outdoor BBQ grills	\$3,600

## Stone Gardens

Beauty Shop Renovation	\$15,000
Heavy duty outdoor BBQ grills	\$3,600
Funds for special theme days	\$1,000
Art supplies for the Art Studio	

## Wiggins Place

Unopened bottles of kosher wine or liquor  
A Donor Restricted Fund for happy hour snacks and appetizers

## Campus-Wide

Cavs tickets (with advance notice please)  
Orchestra tickets (with advance notice please)  
Broadway series tickets (with advance notice please)  
Funding for Distance Learning programs \$100 - \$200 per program  
Nearly new, large print books for campus libraies



**The Celebration of Kwanzaa was celebrated in the Adult Day Center thanks to the Fannie & Edward Baker Cultural Enrichment Fund.**

# Car Donations

If you have a car, in working condition, that you'd like to donate to charity, please consider giving it to Menorah Park. We'll take care of the details. Contact Carol Wolf for information on how to turn your car into a charitable gift.



# Annual Campaign Update

*Once again, we'd like to thank everyone who made Menorah Park's first annual campaign in recent memory such a success! We raised a total of \$196,388.*

## Donors to annual campaign

Adele Ack • Eileen Adler • Norman Adler • Charlotte & Harold Agrast • Alpha Office Products, Inc. • Applied Laser Technologies, Inc. • Sandra Arndt • Sheryl Aronson • Christine & Dennis Aster • Jordan Band • Elizabeth Barber • Alice & Walter Baumol • Bedford Nissan, Inc. • Mary Ann Bednar • Marilyn & Marshall Bedol • Eunice & Ernest Benchell • Lois & Sanford Benjamin • Marcia & Alec Berezin • Beatrice Berger • Nora & Brian Berman • Esther Berman • Stanley Bernath • Catherine & Jon Beyer • Marilyn & Jeffrey Bilsky • Martha & Bob Binstock • Nadalane Bloch • Betty & Stan Blum • Deborah & Howard Bobrow • Bonezzi Switzer Murphy Polito & Hupp Co. LPA • Susan & Dan Borison • Irving Bradley • Helen & Herb Braun • Rosina & Howard Brenis • Brickman Group Inc. • Carol & Harvey Brodsky • Florence Brofman • Ricki & Harvey Brown • Molly Brudnick • Gloria Bruell • Beverly Bushman • Mary & Harold Chaitoff • Elaine & Robert Chaplin • Lynn & Barry Chesler • Debby & Kenneth Cohen • Susannah & Avery Cohen • Ellen & Vic Cohn • Bonnie & Michael Cole • Joseph Cole • Helen & Ralph Cortell • Marcy & Richard M. Cowan • Doris & Marvin Cramer • Judy & Howard Danzinger • Deena Davis • Sallie & Robert Deitz • Diversified Piping & Mechanical, Inc. • Fran & Mark Doris • Frances Eckelson • Rebecca Eden • Marjorie Edguer • Electrical Appliance Repair Service • Rosalyn & Jerome Ellerin • Ruth & Mark Elliott • Jackie & Elsner • Jackie Elsner • Esther & Bernard Epstein • Natalie & Mort Epstein • Howard & Epstein • Goldie & Daniel Ermine • Julie & Joel Falck • Roslyn & Avroy Fanaroff • FEC Mobile Eye Clinic • Shirley & Joseph Felber • Wendy & Richard Feldman • Ellen & Michael Feuer • Ruth & Alvin Fisher • Emily Fleisher • Benjamin Frager • Elaine & Robert Frank • Carol & Mort Frankel • Lewis Frauenthal • Donna & Ronald Garsha • Lois Gaynor • GE Foundation • Phyllis & Joel Gecht • Herb Geduld • Saul & Molly Genuth • Vivian & Hyman Gildenhorn • Judy & Gerald Gillette • Irving Ginis • Laurie Girsky • Madeline Goldstein • Sally Good • Sidney Good • Meta & Jerome Goodman • Ruth Gordon • Arthur Gottesman • Janet & Bernard Greenberg • Greystone & Co. • Helen & Sheldon Gross • Barbara Gross • Candy & Brent Grover • Helen Gutowitz • Hahn Loeser + Parks • Elsie Handler • Hausser+Taylor LLC • Cristal Hawthorne • Heights-Blaugrund Weingarden • Charlee Heimlich • Robert Heksch • Rebecca & David Heller • Sheila & Gerald Herschman • Joyce Hill • Hillcrest Ambulance Service • Beverly & Lee Himelfarb • Janet & Michael Horvitz • Lynn Berg & Howard Bram • James Hughes • Susan & Joel Hyatt • Jeanette Ilitzky • Ben Irwin • Keith Jacobs • Jane Jacobson • Minda & Jack Jaffe • Jane Frankel Interiors, Inc. • Jordan Construction, Inc. • Jean Joseph • Elaine & Norman Kabert • Lola & Melvin Kamins • Lorene & Robert Kanner • Amy & Ira Kaplan • Meryl & Jeffrey Kaplan • Robert Karns • David Katz • Michael Katz • Judy & David Kaufman • Ileen & Marvin Kelner • Adelle & Alvin Kendis • Key Foundation • Nathalie Kirlik • Joan Kirschner • Linda Kirschner • Marlene Klanfer • Sandra Klee • Judy & Larry Klein • Richard Klein • Dolores & James Kleinman • Terri & Stuart Kline • Elayne & Ronald Kluchin • Maxine & Hersch Koblenz • Robert Kohn • Elsa & Irving Konigsberg • Jennifer & Randall Korach • Terri & Kenneth Kraus

• Rosalind Krasney • Addy & Alvin Krenzler • Audrey Kursman • Shirley & Sanford Kutash • Elayne & Robert Kwait • Joel Landau • Marilyn Landau • Brenda Kroos & Larry Renner • Rose & Daniel Lash • Jane & Jordan Lefko • Reeva & Lawrence Lettovsky • Teri & Mark Levine • Sydell Levine • Aileen & Donald Levy • Alvin Lewis • Nancy & Keith Libman • Sandra & Bill Lieberman • Earl Linden • Milton Linden • Jan Litvene • Lois Luntz • Mary Mann • Anthony Marchetti • Lois & Martin Marcus • Shelley & Greg Marcus • Ruth & Doug Mayers • Lynda McAndrews • Medical Mutual of Ohio • Barbara & Stanley Meisel • Susan & Peter Meisel • Hortense Meyer • Ruth & Allen Miller • Norman Millstein • Stanley Morganstern • Amy & Marc Morgenstern • Harriet & Mel Morris • Karen & David Morris • Multi-Flow Dispensers of Ohio, Inc. • Bonnie & Dieter Myers • Jessica & Chuck Myers • Sheila & Gary Myers • Helen Nadle • Helen & David Nagusky • John Newburger • Marjorie & Arthur Newman • Annette Newman • Marina & Mark Neyman • Mary Nicholls • Ellen Nolf • Omnicare Lomed Pharmacy • Grace Ordín • Lenore & Nate Oscar • Kathy & Terry Ozan • Alan Payner • Renee & Fred Pearlman • Jane Pearson • Sharon & Joel Peerless • Perkins Eastman Architects, P.C. • Barbara & Michael Peterman • Pioneer Environmental Systems, Inc. • Iris Pistell • Pollak Food Distributors • Deborah Porter • Florence Potash • Loir & Steve Raichilson • Lucille Reeves • Regal Carpet Center, Inc. • Elaine Rembrandt • Gertrude Rice • Harriet Warm & Richard Blum • Melanie Richards • Richter & Associates • Ridge Plumbing, Inc. • Joan & Rick Rivitz • Irving Robinson • Elaine & Daniel Rocker • Amy & Kenneth Rogat • Marjorie Rollins • Miriam & Richard Ronis • John Rose • Norton Rose • Charles Rosenbaum • Enid & David Rosenberg • Beth & Frank Rosenberg • Sally & Melvin Ross • Devorah Ross • Betty Rosskamm • Harriet Roth • Rochelle Roth • Martin Rothman • Alan Ruben • Charles Sacks • Evie & Gordon Safran • Barbara & Aaron Saltzman • Judith & Burton Saltzman • Jim Samuels • Linda & William Schecter • Gail & Elliott Schlang • Jerome & Schmelzer Schmelzer • Diane & Harvey Scholnick • Barbara & Richard Schreibman • Alice & Robert Schubach • Linda & Stuart Schulhof • Paula & Walter Schwartz • Leonard Senkfor • Shaker Auto Lease • Katie & Michael Shames • Gary Shamis • Charles Shanks • Louise Shapiro • Lawrence Sherman • Laura & Alvin Siegal • Eileen & Robert Sill • Pauline Silverman • Marc Silverstein • Sherrie & Bart Simon • Ann & Phillip Singer • Geri & Harry Singer • Naomi & Edwin Z. Singer • Maxine Slone • Shirley & Harold Smith • Snavely Construction, Inc. • Marilyn & Ivan Soclof • Michal & Steven D. Soclof • Nancy Glick & Randy Solomon • Maryon Sonkin • Marsha & Jim Spitz • Karen & Daniel Steiger • Geraldine & Mort Stein • Marilyn & Robert Stein • Thelma Stern • Harry Stone • May Straniero • Penny & David Strauss • David Sutton • Ernest Tallisman • Hyman Tashman • Tibor's Kosher Meat Market Inc. • Susan Turiel • Raisa Ulanovsky • University Heights Lodge • Thomas Valore • Ruth Viny • Ellen Vollweiler • Jeanette Wasserstein • Peggy & Phil Wasserstrom • Joy & Jerry Weinberger • Eleanor Weisman • Judy & Morry Weiss • Leo Weiss • Margaret Weiss • Edwin Whitman • Steven Wiesenberger • Jane & James Wolf • Carol & Michael Wolf • Rhonda Wolfson • Elinor & Larry Wymor • Donna & Bennett Yanowitz • Eileen & Allen Youngman • Iris & Gerald Zahler • Judy & Donald Zauderer • M. Cory Zucker .